

# **Horizon SmartPartner Super Custom Proposal System**

The Super Custom Proposal System is a highly automated software system designed to empower workgroups in the Sales, Installation and Management of Electronic Systems and Services.

This software is subscription based and available only to Horizon Software SmartPartners in selected markets. SmartPartners work together with Jim Engandela and the Horizon team on the continual development and implementation of the software to improve their operational efficiency and profits.

SCPS is a true multi-discipline proposal and project management system that automatically configures proposals by discipline, area and installation phase. Complete job costing and project management can be accommodated by discipline and installation phase.

SCPS is PC and Mac cross platform compatible and mobilized for in-shop and on-location use by management, bookkeeping, sales and service users. SCPS is a highly relational database system that utilizes 4<sup>th</sup> generation graphical interface that is intuitive and easy to use.

SCPS is a self contained user environment for proposal generation, client communications and project management, with its own contact manager, automated task manager and integrated word processor with spelling checker.

SCPS has a high degree of conductivity with other bookkeeping, contact/project management, spreadsheets, databases and internet applications utilizing importing and exporting, ODBC, JDBC, and Active X technologies. Integration with QuickBooks and the Retail Computer Management System is built into the Software.

Proposals can be easily created by simply picking the desired products for each area in the project. Six user definable kinds of installation labor and rates, bulk and precut wire and cable, and associated parts are automatically included in the proposal as these products are selected. Installation tasks required for each product are automatically created for Installers and technicians at the same time.

Proposals can be instantly reconfigured based on user defined installation types and products, labor, wire & cable and parts are automatically reassigned to the appropriate installation phases.

Multiple payment plans based on actual charges by installation phase or percentages

including deposits and retainers are automatically calculated and included on the contract.

Bulk wire and cable, home and room run lengths are automatically calculated based on the square footage of the building. Each wire and cable is individually accounted for with source and destination markers for ease of installation.

Six different kinds of installation labor, rates and times can be assigned to each installation phase required for each product. Installation time and charges are automatically adjusted based on the degree of difficulty factors of the project such as building construction, number of floors etc.

Additional fees for design & engineering, documentation, travel and lodging, etc are automatically included. Technical services fees for programming, projector calibration, etc are also accounted for.

Printed proposals are completely user customizable and can be printed on a wide variety of printer in full color. Proposal sections include a Cover page, Client introduction, Shop credentials, System Designs, Areas & Products, Additional fees and Client contract.

## **Outstanding Performance**

All new code using FileMaker Pro

PC 95/98/ME/NT/2000/XP compatible

Mac OS 8/9 and OS X compatible

PC & Mac Terminal Server/Citrix compatible

Network Multi-User capable with 100 simultaneous users

Open architecture for integration with Microsoft Office and other programs

ODBC compliant for integration with RCMS & other bookkeeping software

XML compliant for integration with QuickBooks

## **Smart Ware Interface**

4<sup>th</sup> generation, easy to use, intuitive user interface

800 x 600 screens optimized for Web publishing.

Multi-tiered tabbed interface with labeled buttons for easy comprehension.

Gray shadings with accent colors for low eye strain.

### **Workgroup Focus**

SCPS software is easy to use with point and click functionality and a minimum of keyboard entry.

Software is specifically designed to assist all members of the dealer's workgroup, both in house and in the field.

Managers, bookkeeping, salesmen, project managers and installers can share information and work together in one, easy to use software environment.

Web interaction with the software enables mobile and client access.

### **True Multi-Discipline Proposals**

Create complete sections, within a proposal, for as many disciplines (audio, video, lighting, automation, etc) as needed.

Proposals can be viewed, printed and job costed by Discipline, by Areas or by Install Phases, complete with all 5 subtotals, (products, labor, wire & cable, parts, fees) along with tax and grand total.

### **Multi-User Products with Automatic Labor, Wire, Parts and Tasks**

When creating a proposal several users on the network can pick products while being in the product library simultaneously.

Each product can be assigned installation times in 6, user defined, categories and across 3, user defined, installation phases.

Products in the Library can be assigned associated parts that will be included as line items in the proposal.

### **Wire and Cable Estimating**

Separate assignments of both wire and cable types for each product.

Wire assignments can be automatically assigned by product category.

Wire lengths are automatically established based on building square footage and other factors such as degree of difficulty.

Wire and Cable installation schedules and labels that include Source and Destination.

### **Automatic Project Manager**

By predefining tasks in the setup preferences, tasks are then created automatically when creating a proposal, when converting it into a project and upon completing the project. These tasks show when payments are due, project milestones, follow-up letters or virtually any event or item that needs to be tracked. Tasks can consist of Primary and Secondary items and are date referenced to the installation phase dates.

Tasks can also be pre-assigned to Products in the Product Library. These tasks can represent installation issues or other events that have to occur for that product. When you bring a product into your proposal the installation tasks assigned to it are automatically created in the Task Manager. These tasks can then be given to the installer as a punch list of things to do and to be accounted for.

Tasks from the Task Manager can be called up by any criteria. Client/Project, Salesman, Date Range etc. and a history of completed tasks is maintained. Tasks can also contain labor hours required and these can be used to allocate men and materials for any project or time frame.

Tasks and Milestones can be displayed and printed in reports and via a full featured month/week/day calendar.

Tasks for each member of the workgroup are automatically emailed to each user every morning so that they know exactly who has to do what and when, for all Proposals, Installation Phases and Completed Projects.

### **Invoices with bookkeeping link**

Invoices can be easily created as products and labor is delivered to your client, directly from the proposal/project.

Full ODBC implementation with RCMS Retail Computer Management Software.

Full XML integration with QuickBooks Pro.

### **Purchase Orders**

Purchase orders, can be easily created and tracked, by

manufacturer or supplier, for each proposal/project. On order and received products can be tracked.

### **Installation Work Orders**

Project Installation Work orders can be easily created by phase with products, parts, wire and labor. Full project details and install times are available on Work Orders. Actual installation times can be tracked in SPCS and compared to projected installation times.

### **Super Change Orders**

Instead of Change Orders simply being a basic invoice, they can now be complete and fully functional proposals that can be presented to your client for approval and then modified before being finalized. Each of these Change Orders shows up as a sub-proposal that can be individually viewed or included in one central Master Project that shows the entire project. This enables all of the management tools such as project and payment tracking, purchasing, install work orders and invoicing to function on the entire project.

Change Orders can be easily modified and reprinted.

### **Master Project**

Master Project contains the summation of the Original Project and all Finalized Change Orders for a complete job costing of the entire project.

### **Flexible Taxes**

Accommodates multiple task rates, including tax on installed product based on the cost of the product instead of the selling price.

PST/GST and other multiple taxes are reported on each line item.

### **Advanced Proposal Design**

New modern looking designs that are both professional and client friendly.

A multitude of user preferences enable a proposal to be configured in

many ways for the most effective presentation

Independent Print Menu that enables user customization to be retained when upgrading.

## **Libraries**

### Product Library

Full Product Details, Specifications, Pictures, PDF's, Labor, Parts, Wire and Install Tasks assignable to each product.

### Product Set Library

Packages of Products can be assembled for each entry into Proposals.

### Text Library

Unlimited text can be stored on any topic for easy entry into Proposal.

### Information Library

Storage for any documentation or information detail for easy reference.

## **Point of Sale Module**

Sales Quotations

Sales Invoices

Work Orders

Service Orders

## **Contact Manager**

Full contact manager with multiple user assignable classifications, multiple contacts and user definable fields.

Full emailing, letter and fax merging and labels for individual contacts and groups.

## **Follow – Up Module**

Easy client follow-up for Proposals and Project using predefined merged letters and labels.

## **GraphicsDraw Pro Drawing Tools**

Integration with Star Draw enables easy creation of Floor plans, flow charts and schematic diagrams.

Automatic SCPS Proposal creation from a Star Draw drawing.